

IMPLEMENTATION GUIDE

Project SAFe

*Using an Evidence-Informed Program to develop
a process model for program delivery in the practice setting*

Note: Refer to “Using What Works: Adapting Evidence-based Programs to Fit Your Needs” and the handouts in Modules 4 and 5 to modify and evaluate this program to meet the needs of your organization and audience.

“Using What Works” is available online at
http://cancercontrol.cancer.gov/use_what_works/start.htm.

To receive training on “Using What Works,” contact the NCI Cancer Information Service and speak to a Partnership Program Representative in your area. This information is available online at <http://cancercontrolplanet.cancer.gov/partners/index.jsp?cctopic=C>.

I. Program Administration (Type of Staffing and Functions Needed)

Patient Navigators (Recommended: site employee, bilingual and bicultural as determined by site demographics)

- Identify and contact eligible patients.
- Assess patient risks and needs, provide immediate brief health education, provide supportive counseling, and assist with immediate problem-solving (telephone or face-to-face).
- Determine ongoing case management plan according to patient risk level.
- Address barriers to adherence, monitor patient progress, provide continuity of care.
- Refer special-needs women to collaborating social worker.
- Complete service tracking and program evaluation data collection forms.
- Consult with social worker as needed.

Social Worker (Recommended: contract or fee-for-service, master’s-level mental health clinician, bilingual and bicultural if possible)

- Contact designated highest-risk or special-needs patients to conduct clinical diagnostic assessment.
- Refer and/or provide brief problem-focused counseling (telephone or face-to-face) according to protocol to address mental health problems that interfere with adherence.

- Provide (or arrange through an oncology social work department) clinical services for women diagnosed with breast/cervical cancer.
- Consult with Patient Navigator concerning difficult patient circumstances.
- Document clinical activity according to site specifications.

II. Program Delivery

For additional information on modifying program materials, refer to Module 4, Handouts #2 and #6 in “Using What Works”: Adaptation Guidelines and Case Study Application.

A. Program Materials (All listed materials can be viewed and/or downloaded from the Products Page)

- **Project SAFe: The Screening Adherence Follow-Up (SAFe) Program Toolkit:** This implementation kit includes the theoretical basis for the program, guidance for organizational readiness, assessment forms, step-by-step instructions for the intervention, training materials, evaluation guidance, and data collection tools.
 - **Chapter 1, An Overview of Non-Adherence and Interventions to Improve Adherence and Quality of Care:** This chapter provides an overview of the problem of non-adherence, barriers to adherence, and interventions to improve adherence.
 - **Chapter 2, Strategies SAFe Program Goals, Target Population, Elements, Effectiveness, and Cost:** This section provides an overview of specific aims, key elements, and evidence of effectiveness and cost.
 - **Chapter 3, State Program Directors Implementation:** This chapter outlines key strategies that state cancer detection programs should consider in planning for and facilitating the provision of patient navigation/case management by screening clinics and diagnostic centers.
 - **Chapter 4, Administrative Steps Prior to Initiating SAFe Patient Navigation/Case Management:** This section outlines key strategies in planning and administering a case management program.
 - **Chapter 5, A Structured Service Manual:** This chapter provides a detailed step-by-step guide for providing SAFe patient navigation/case management, including examples of options for program elements to tailor the SAFe service to meet local program needs.
 - **Chapter 6, Evaluation and Quality Monitoring Guide:** This section outlines case management monitoring and evaluation processes and provides process and outcome indicators.
 - **Chapter 7, Patient Navigation/Case Management Training Guide/Manual:** This chapter includes training content, instructions, exercises, case vignettes, and pre- and posttests to be used as a self-administered training process for patient navigators and social workers.

B. Program Implementation

The steps used to implement this program are as follows:

Step 1: Identify and reach eligible participants.

- Connect with hospitals or clinics to become a recommended resource for women receiving abnormal test results.
- Additional community outreach, through community groups, nonprofits, and other organizations, may also help identify eligible participants.

Step 2: After the participant has been informed of abnormal test results, the Patient Navigator contacts the participant (telephone or face-to-face) and provides scripted initial health education, support, and risk assessment. Key tasks for the initial contact include:

- Establishing rapport
- Providing health education and emotional support
- Finding out about participant problems, needs, and capacities
- Problem-solving
- Linking to another helper if needed

Step 3: Patient Navigator creates the participant's service plan, which may include referral to a contracted social worker.

Step 4: Patient Navigator continues ongoing case management services, supplemented with mental health services by the social worker if needed.

- Track all appointments
- Problem-solve with participant as needed.
- Refer to and coordinate with other community resources.
- Case management services may continue for 6 months to 1 year.

Step 5: When the period of service concludes, the Patient Navigator contacts the participant by telephone to terminate.

- Clearly tell participant service is ending and when it will end.
- Briefly review accomplishments and acknowledge difficulties.
- Reinforce self-health care, including regular rescreening.
- Link participant to other resources if appropriate.

III. Program Evaluation

For additional information on planning and adapting an evaluation, refer to Handouts #2-8 in Module 5 of “Using What Works.”

For further assistance in designing and conducting an evaluation, go to the Cancer Control P.L.A.N.E.T. Web site and see Step 2: Identify potential partners to find a research partner in your area. This information is available online at

<http://cancercontrolplanet.cancer.gov/partners/researcher.jsp?cctopic=0>.